ECONOMIC GROUP PENSION SERVICES

JOIN OUR TEAM!

OPEN POSITION: DB Retirement Plan Consultant
LOCATION: Nationally - Remote

PRIMARY RESPONSIBILITIES:

- Manage and complete all aspects of administration of a caseload consisting of Defined Benefit Plans
- Analyze provisions in plan documents to ensure compliance with IRS and DOL regulations
- Confirm and analyze census information, determine eligibility, key, and highly compensated employees and input data
- Calculate employer contributions including related nondiscrimination testing, coverage testing and other compliance requirements for more complex plans
- Allocate employer contributions after considering top-heavy status, deductibility limits, and impact of forfeitures
- Identify and communicate non-compliance issues to clients and make recommendations for correction
- Identify issues related to fiduciary responsibilities, such as adequate bonding, impact of nonqualified assets on bonding, and prohibited transactions
- Allocate gains and losses on pooled and individual accounts
- Evaluate takeover plans and identify compliance issues
- Review pension trust accounting reports for accuracy
- Prepare client reports and confirm accuracy of data
- Communicate issues and recommendations for resolution to client
- Review plan to make recommendations to client to maximize tax advantages or other benefits
- Assist clients in establishing policies and procedures to communicate plan benefits to their employees
- Support DOL, IRS and Account Audits, as needed

REQUIREMENTS:

- Competence in all areas of Defined Benefit Plan administration
- Comprehensive and increasing understanding of complex plans
- Sound knowledge of compliance requirements regarding employer contribution calculations, deduction limits, contribution deposit deadlines, top heavy determination, coverage testing, controlled groups and annual additions limitations
- Knowledge of all aspects of distributions
- Understanding of IRS filing requirements and deadlines for qualified plans
- Understanding of methods for researching DOL, IRS and other related regulations and procedures
- Ability to effectively communicate, both in writing and orally, with a wide range of outside contacts in a professional manner
- Maintain a positive attitude when addressing client questions and problems
- Ability to work under pressure of deadlines and demanding clients
- Work with minimal supervision

- Good organizational skills and ability to set priorities consistent with Service Standards
- Adjust priorities with changes in the annual business cycle of pension administration
- Analytical and critical-thinking skills
- Detail orientation
- Excellent Interpersonal skills
- Demonstrates initiative
- Good judgement
- Software Skills: MS Office 2007--Excel, Word, Outlook; DATAIR, ft william, CMS, Adobe Acrobat

Minimum of two to five years of Defined Benefit pension administration experience requiring critical thinking, analysis, detail orientation, customer service and/or two to four years of college classes including accounting, math, and communications.

HOW TO APPLY:

Interested candidates should apply by submitting resume to HR@egps.com.